



Podcast Transcript

# Risk Never Sleeps

## Episode 115

### James Case

**Ed Gaudet:** Welcome to the Risk Never Sleeps Podcast, in which we learn about the people that are on the front lines, delivering and protecting patient care. I'm Ed Gaudet, the host of our program, and today I am pleased to be joined by my good friend, and I can call you good friend, James Case, the vice president and chief information security officer for Baptist Health in Jacksonville, Florida. Welcome, James.

**James Case:** Hi. How are you?

**Ed Gaudet:** I have to take a breath now because that was quite a sermon. That was a lot to, that was a lot to get out. I'm doing well. I was at HLTH last week, and coming Vegas did not take my money this time, which was good. I came home with their money. But HLTH is always good. It's good to see people that go and meet new folks, and so it was good. But let's get right into it. Our listeners want to know about you, not me. James, let's start with you. Let's start with your role and your current organization.

**James Case:** Let's see, we're also CISO, right? Some head of cyber. And that means I get to approve all the risk. Now, I'm joking, right? I often say I'm not here to approve risk. It doesn't lower the risk at all for me to just rubber stamp stuff, right? So I preach, and I have it in my mission statement that my number one role is to help ensure that informed. And you'll love this word, risk-based.



**James Case (cont'd):** Decisions are made about risk, right? So I think that's my primary role. Baptist Health, we're at Jacksonville, Florida, six-hospital system, 80 or 90 doctors' offices. So, we're important to remember that Baptist Health there are Baptist Health all over the country, and we're not related. So Baptist Health in Miami is not Baptist Health in Jacksonville, although we're friends and we talk and we collaborate, but we're not the same system, for your listeners.

**Ed Gaudet:** Yes. And actually, you would be my hospital if I ever get sick when I'm visiting Florida, because we're we travel in that area. We definitely want you to stay vigilant about patient safety and patient care. How did you get into healthcare? And I noticed you were at Baptist for a while. You left, and you came back. Tell us the story.

**James Case:** Or how long do we have? And how do you? I wasn't prepared for this. Although there is no prepr, right, this is just.

Ed Gaudet: It's just your journey, man. It's your story.

**James Case:** How did I get into healthcare? I worked at Compaq in Houston, Texas, for about 7 or 8 years and then moved to Florida and worked for Winn-Dixie as a project manager, as an IT project manager, and Winn-Dixie. I was there for the perfect time when the 1200 stores and when I left, they had 600, so they were not doing well. Well, I interviewed for a project manager position at Baptist Health, and I would say the rest is history. I did end up leaving in 2017. I was away for four and a half years and came back to the family and say, I love it. I stayed in touch with everybody And it was really, some people didn't know I left, right? Maybe it's kind of funny.

**Ed Gaudet:** They just thought you were on vacation, right? That's great. When you think about there's a lot been happening in healthcare, and I'm sure you're busy every day is something new. How do you think about the next couple of years, though? Strategically, what are the things you're looking at from an overall initiative perspective?



**James Case:** Risk reduction, right? Yeah. Data loss prevention is one of my key projects that we're working on. That takes a year-plus; it's really just a partnership with our privacy and our legal and our compliance and our audit to and then our security teams to partner together to figure out where do we see the most risk, right? I'm going to say that word a thousand times. But that's really what we do. And it's it's impossible to solve every risk. And so I love that that I'm allowed to be transparent. And in my first board presentation, I was able I said, hey, we're not going to solve every risk. We can't, even if you tripled my budget, I can't solve every risk. Not to say that you should cut my budget. But the point is, we can't solve every risk, even with unlimited funds. And so then it really forces the mindset to prioritizing. And then again, risk is the key is the the legend for the prioritizing. And just one nugget that I was thinking about coming into this meeting that I haven't, that I've been waiting to say it, I'm just going to tangentially shove it in here, but. Or raise it up. But I don't do it as often as I used to. But I used to start, and I need to bring it back up again and do it. But if I do it like a presentation here at Baptist, I'll just start with the word risk on the page, like, and 240 or 180, whatever the font would be to fill the whole screen, whether it's a 20-person presentation or a 200 person. I did that, and really my first year or two, I'm closing in out my third year now. But because my point was, no matter what I say after this slide, it comes back to this word, I'm here because of this word. I was only hired because of this word. What do I do? Every email I write, every conversation I have. Every healthy debate I have with people is about risk. And I thought you would really enjoy that editor because it's what it's what we all do as practitioners, right? We're really risk managers, and it's helping our health systems and our business leaders and IT leaders navigate that journey of risk. So, to me, that kind of summarizes the role. I know that's not what you asked, but I've been waiting to say it. So I wanted to get out there.

**Ed Gaudet:** Yeah. No, I love that. And it is one of those human qualities that sets us apart from other taxonomies of animals, if you will. The ability to be conscious of risk and to actually think about it in ways that force a decision or probably increase the risk of us doing something that could get us in trouble. And I think if you look at the history of risk, which is fascinating, how it evolved over the years, you realize every day everybody, regardless of who they are, is dealing with risk at some level. You get out of bed, You walk out the door, you cross the street, you get in a car. All risk-related activities, right?



**James Case:** Sure. And staying home is risky, too, because the meteors are following you.

**Ed Gaudet:** Staying home. Staying home is risky. If you don't move too much, you become sedentary, right? So there's health ramifications. So this notion of risk really does set us apart and everyone deals with it. And I love the fact that you talk about it as a business quality, not a technical quality.

**James Case:** 100%.

**Ed Gaudet:** Yeah, because I think a lot of people miss that. And so how do you talk about that, and when did the light bulb go off for you that it was a business issue and not a technology issue coming from you?

**James Case:** I'd say, about eight years ago, I wrote on LinkedIn several times over the past six, seven, eight years about that IT shouldn't make all the risk decisions, right? That some things sure, some things are small enough. Maybe okay, but there are things that could really impact the business impact. Patient care is not an IT decision to me. That's the light bulb, right? So I've written over and maybe not over and over a few times on LinkedIn about how, in my opening statement to you, about my mission statement about helping to facilitate informed, risk-based decisions, what the rest of that sentence is by the right business and technical leaders. So I didn't add that on, but it is in my written mission statement that just hit me one day as a light bulb, 5 or 6 years ago. Yeah, it's definitely a no brainer to me. It just makes sense. It's logical. It's not my risk, it's the organization's risk. So why should I make all the decisions I need to bring in the right people? Because they need to understand if they. I'm not here to say no; I'm here to say I wouldn't do that. Here's why, right? And this one's really big. So we're going to take this up to the full committee to be reviewed. This isn't really just a 1-to-1 decision, right? This is going to need larger review. So those are really the key functions of my role here.

**Ed Gaudet:** And how do you help educate the business to understand that? Because I think a lot of business owners are probably a little off-put when you come in and say, I'm not going to tell you no, but I'm going to tell you what the risks are. Ultimately, it's your decision to make. Now, all of a sudden, there's a responsibility transfer, if you will, that takes place. And sometimes that's off-putting to the business because they've never heard it before.

**James Case:** Yeah, that's a good point. I would say it's a great question, and there's no perfect answer other than I would say my gut on that would be it's because 99% of the leaders here at Baptist are just we get along. It's like family. We all. And if we have any conflict, it's healthy conflict, right? Based on trust. And yeah, I would say everyone gets it, and you're about there. Yeah, there's like a mindset shift there when again, if you're asking me to prove this that doesn't help anybody. Let's talk about the risks. In fact, when I wasn't at Baptist Health, I was at Citibank, and my manager there. I thank her for she, I'll say, beaten into this sounds bad. But over and over to the team about security officers, right? We were leading the business on really risk-based decisions, and we would frame up risk, and she would push back and say, so what? So that, I thank her for that. It taught me, so I really think about that when I'm, as I'm framing a brisk, I still go back and think about, so what? I ask myself, so what am I answering this? So what? So I don't know. So those are building blocks have really gotten me to this mindset to help lead that and partner with the business. It's all about partnerships. So to guide on that decision so we can arrive at, I'd say the least bad answer.

**Ed Gaudet:** Yeah. In this notion of calibration, right? To understand and predict likelihood and impact in a way that's meaningful, right? Not in a way that all of a sudden, oh, here comes Cassandra. Here comes the boy that cried wolf, right? Telling us about another risk, right? But doing it in a way that's meaningful and saying, hey, last time we had this, here's what happened. And talk about that calibration that happens, and maybe somehow, do you apply the learnings that you receive over the course of a year?

**James Case:** That's a good point. So, by calibration you mean learning. So things that we've done that we that maybe we would have done differently, like lessons learned internally.



**Ed Gaudet:** Yeah, yeah. That's if you feel comfortable sharing that.

**James Case:** Or I guess it'd be crazy to say that never happens. So it doesn't happen very often. But of course, we have lessons learned. I would say that maybe the larger part of that would be reading the headlines, and reading the articles, and doing the research, and trying to learn from others. We all try to learn from each other, and we collaborate a lot. I love how much collaboration I'm able to do, and I do. It's great to help each other again. The CISO community, we're all family, right? And we text and chat and signal and all those sort of things to stay in touch and help each other out. So I would say as far as lessons and collaborations, it's more from the outside trying to learn. But of course, internally, we will learn. I certainly don't have any details, can't share any details. Luckily, that's bad. It's a good question. There's just no good answer to it. So, I'm sorry.

**Ed Gaudet:** Yeah, and anything surprise you from the relationship that you've been able to develop over the years with the business? Maybe pleasantly or otherwise?

**James Case:** No. I would have to say pleasantly, right? That everyone is listening, embracing, and inclusive and invites me to go to their meetings. So I come and present at the different hospital leadership meetings or a primary care or different areas of the business. And it's about relationships, right? So when something does happen, whether it's an issue or a question or a concern, where to have the relationship so we can start the conversation at the right point to arrive at the best answer for the health system, the lowest risk option, right? The the least bad answer. I think one other thing I've been wanting to say that kind of ties to everything is that there's probably once a week I end up saying the phrase, and this ties back to risk. I say at least once a week, I end up saying in a meeting in some way to a person or a group of people when we're trying to navigate a decision. I'll say we have to run a hospital. So, to me, it dovetails into that we can't say no to everything, and we can't say no to a lot of things, but we can say, no, but here's a lower-risk option. Here's a safe way to do it. Here's a compliant way to do it. So it's the, again, the phrase that comes to mind is, we can't stop everything. We can't prevent everything. At the end of the day, we have to run a hospital, right? As that again a mindset or a thought process that then feeds into, then let's find the lowest risk way and then we have to proceed. And then we document that analysis so we know what we were thinking at the time.



**Ed Gaudet:** Yeah. No, I love that either apply a control or.

**James Case:** Compensating ...

**Ed Gaudet:** Yeah, or mitigate it in some fashion that allows you to monitor. You can't. If we were to if we were to really manage risks, the business wouldn't operate, right? Because we would be closing things down and shutting everything. Go back to paper. Less risk. I am okay outside of your day job. What would you be doing? What are you most passionate about?

**James Case:** Oh, wow. That's a good question. I know spending time with family, going to the beach, those sort of things, and traveling a little bit here and there, and.

**Ed Gaudet:** Where's your favorite place to travel?

**James Case:** To the beach. Any beach, really. North Carolina, Florida, West Coast. It's been a while since I've been to the keys. Montana.

**Ed Gaudet:** Montana? That's not a beach.

**James Case:** That's true, but that falls under the travel category.

**Ed Gaudet:** No, I love Montana. No, it's.

**James Case:** I used to be big into photography in high school and college, but the iPhone really ruined that. I still have a lot of money in lenses, but I've not picked a lens in 10, 15 years.

**Ed Gaudet:** Yeah, it ruined it in some ways. AI is ruining it in other ways. But it also, I think, elevates it at a level that when you see great photography, like it from someone's 70,000 photos, like my iPhone has got so many photos on it, I take so many photos, which is fine until you want to find a photo.

**James Case:** That's true.

**Ed Gaudet:** You can't do it. All right, so let's see. Read any good books lately? You seem like a book reader.

**James Case:** Once or twice a year, but nothing comes to mind at the moment. There's one about the gator. Trusting your gut with the gator instinct.

**Ed Gaudet:** No, I don't know that. Is it a business book or?

**James Case:** No, it's like a decision-making book. Split second. Making decisions, trusting your gut. The, like the judge and the gator are, like, on your shoulders and trying to balance in between the two, so that ... really good.

**Ed Gaudet:** Like the devil and the angel?

**James Case:** Like that, right, but it's a book that goes through examples and the whole methodology on decision making, and they give examples where all this detailed analysis and they were wrong. And then the person that made the gut decision was right. And so it's not that you obviously should do that every time, but yeah, it's the awareness around that thought process of a really decision making.

**Ed Gaudet:** No, that's a really good point because I'm highly intuitive. And all my life I usually leave with my gut. And as the older I get, I realize I need to be more data-driven. And so, it's funny, whenever I'm wrong, it's typically because I didn't go with my gut. I applied too much data and too much thought to it, and I ended up making the wrong decision. So now I try to tap into much more of a balanced, data-driven, intuitive approach versus just not really thinking through what my gut is telling me or trying to tell me, and then using the data or applying the data to really understand what's happening there. So that's I'll check that book out. Thank you, sir.



**James Case:** Yes, sir.

**Ed Gaudet:** If you could go back in time, James Case, back in time, what would you tell your 20-year-old self?

**James Case:** Yeah, that's crazy, because when I was 20, I had no idea where I'd be today. I knew I wanted to do engineering and that was my degree, electrical engineering. And I really enjoyed compact and teamwork there and engineering there. I think the one thing that I go back to and think about occasionally is maybe getting a mentor sooner. I was late in my career when.

**Ed Gaudet:** Interesting.

**James Case:** When I got a mentor, and that's the advice I give to people now that they get a mentor sooner rather than later. If you want help navigating your career, if you want help getting feedback, if you want that that honest, raw feedback to help you improve, and as well as navigating all the politics of a company.

**Ed Gaudet:** How old were you when you pick up your first mentor?

**James Case:** Oh, my 40s.

**Ed Gaudet:** Oh, wow. Oh, yeah. Yeah. Well, what did that mean to you? What was the first thing you noticed when you started working with a mentor?

**James Case:** Oh, it was just, it was cool because it was somebody obviously, in the context, several levels above me on the food chain. And so I really appreciated her time and her investment in me, and that meant a lot. So I know when she was giving me advice, she's not just lip service, right? It really meant, yeah. And we actually stay in touch to this day. We have coffee and lunch sometimes, and that was over ten years ago.



**Ed Gaudet:** I love that, and I'm sure her perspective helped you actually gain perspective on things that maybe you were thinking about differently. Yeah, yeah. No, I was fortunate someone mentored me early on. I probably resisted more than anything, but he would always tell me things I never wanted to hear, but I knew I needed to hear.

**James Case:** That's good.

**Ed Gaudet:** When I was younger. And so I've always I continue to work with a mentor today, and I love it when people ask me to be a mentor. I just think it's to me, that's like the highest praise someone can give you.

**James Case:** It's an honor.

**Ed Gaudet:** Yeah, it's an honor. It's truly an honor. Yeah. Humbling. When someone comes to you and says, I want you to help me navigate life, basically my job. And I get called for personal things, too, now and then. It's crazy. All right, James Case, this is the deal. Can I call you James Case, by the way?

**James Case:** That's my name. Yes, Ed Gaudet.

**Ed Gaudet:** It's Halloween, James. I'm like crazy right now. You guys, I had to run out and grab candy. Oh, this is. I had to run out and grab. First of all, I had to dress up for my company party, my company meeting tonight. So I did Michael Myers at Mardi Gras. So you can see, like, a Mardi Gras hat here. I don't know if you can see this thing, but I'm so Myers mask, and I had some beads, too, to go with it that I dug out of the woodwork. And I did not win, though, so the prize. But then I was asked to go out and get some candy because my wife had forgotten to get candy. And we get bombarded with kids every year. And that was not as easy as I thought it was going to be, because there were 8 to 12 women that were guarding the candy area at the CVS, and I couldn't get my probably would have lost a hand if I tried to reach in and grab.

**James Case:** That sounds risky.



**Ed Gaudet:** A bag of Snickers. So I was able to, I was able to turn the corner and they had a whole display that nobody was at, so I grabbed candy from that. But anyway. All right, James Case. Riskiest thing you've ever done.

**James Case:** Oh, jeepers. Even if I think of something, would I say it? I'm pretty paranoid and risk-averse in life. I don't click on anything I want. My whole family makes fun of me.

**Ed Gaudet:** And skydiving, shark diving.

**James Case:** I did scuba diving as a.

**Ed Gaudet:** Scuba diving.

**James Case:** My younger years, and then I wasn't risky.

**Ed Gaudet:** First row, of a concert. Front row of a concert, drive across country?

**James Case:** No, I'm pretty boring. Good question, but not a good answer, sorry. I got little for you. If I think of it, I'll text you later, but I just.

**Ed Gaudet:** That's okay. Did you play sports as a kid?

**James Case:** I swam.

**Ed Gaudet:** Oh, swam. Okay. Yeah. Living in Florida can be risky. You have your share of risks in Florida, right? With the weather.

**James Case:** Drivers.

**Ed Gaudet:** The drivers and everything else associated with it. All right, all right. I feel like I shouldn't let you off the hook on this question. No one's never answered this question before.

**James Case:** Because I was the first.

**Ed Gaudet:** Okay. Okay. Riskiest thing you've ever done was, come on. This program, I think, is, what's happening here?

**James Case:** I'd like to lock that in, yes.

**Ed Gaudet:** Okay, we'll lock that in. All right. Let's try this question. You're on a desert island, and you can bring five records with you, or five albums. Music. This is music. What would you bring?

**James Case:** Some of my favorite bands, right? Depeche Mode and The Cure, New Order.

**Ed Gaudet:** Oh, there we go. There we go. Look at you, New Order.

**James Case:** Oh, yeah. Nice. I saw them in concert last summer. As well as The Cure.

**Ed Gaudet:** The Cure is amazing. I just saw them a few years ago, and they have a new album coming out in a couple of weeks.

**James Case:** I heard that. That's crazy.

**Ed Gaudet:** Yeah, it's crazy. Robert Smith is having a midlife crisis or something.

**James Case:** And Coldplay.

**Ed Gaudet:** Yeah, yeah.

**James Case:** Imagine Dragons is really good, I don't know. So those are the ones that come to mind.

**Ed Gaudet:** Now, what about the precursor to New Order? Do you know that band with Ian Curtis?



**James Case:** If you say the name, I'll know it.

**Ed Gaudet:** No, I'm not going to say it. I want to watch you think about it.

**James Case:** Okay. I do know it. I just don't know it, but I wasn't. New Order was my band, not the precursor, but.

**Ed Gaudet:** Oh, okay. New Order. Yeah, yeah. Blue Monday. Is that the one of the songs?

**James Case:** Blue Monday was one of their songs.

**Ed Gaudet:** Yeah, yeah, really great beats and. All right, how about movies? You a movie guy?

**James Case:** Oh, yeah. I like all the Avengers and, but if I had to go back a little bit, I'd say like Gladiator, one of the ones I watched.

**Ed Gaudet:** There's a new Gladiator coming out.

**James Case:** I saw the preview.

**Ed Gaudet:** You did?

**James Case:** Yeah. I'm looking forward to it. I'm a little upset they're messing with the original, but it's a continuation, so they're not like redoing it or anything. But yeah, hopefully, it does justice. It's got Denzel.

**Ed Gaudet:** I think so. I don't really, I think it does. Yeah. Yeah.

**James Case:** And he's awesome normally.



**Ed Gaudet:** So I saw a remake of a movie which I liked back in the 80s called Roadhouse. Oh, it's a remake. Oh, yeah. Yeah. It was so good. It was so good. Yeah. Yeah. I want to go and fight in a cage after watching that movie.

**James Case:** It wasn't very good. I saw it twice even. Yeah.

**Ed Gaudet:** You did. Oh, okay. You're a little closet cage fighter there.

**James Case:** Oh, yeah. That's me, but dangerous, there we go, I'm dangerous.

**Ed Gaudet:** There's the risk. You could. You could have said that I cage-fought for three years. Okay. Hardest lesson in your career?

**James Case:** Oh, I don't know. I'd say knowing when to give up, maybe knowing when to turn and go a different direction was a difficult lesson, right?

**Ed Gaudet:** Yeah. Pivot.

**James Case:** Bang your head on the wall.

**Ed Gaudet:** Yeah, that's a good lesson. That's a life lesson, not just a work career lesson.

**James Case:** That's true, but in this context, it is about work. But yeah, I guess the concept would apply to anything. Yeah.

**Ed Gaudet:** Yeah. That's good. That's good. All right. We're coming down to the wire here. What advice would you have for someone coming out of school? New graduate wants to break into healthcare and/or cyber. What advice would you give that person?

**James Case:** They're just coming out of school, I'd say. What is your degree? And would you, would their entry be into like analytics or data related, or clinical? Or if it's just pure IT, maybe the service desk or technician or whatever, and then work your way up, right? We're networking and like network engineering. And because I'm a pretty big believer that you probably shouldn't just start out in cyber, you probably need to work your way into it to learn the networking, learn the different pieces of the puzzle, the infrastructure, and then, knowing where you want to go, right, and then keeping that in mind and navigating and then work your way through and up and that's what I normally guide people on versus just again, day one moment, one job, one heart, right into cyber. Although I guess what makes me wrong, maybe back, maybe I'll backpedal a little bit. I'm thinking old school when I was a student. I guess now there are classes and schools and degrees about cyber, and I think that does change things. So I'd like to modify my answer and say, depending, and I guess I did say depending on what you like had your degree in it was cyber-related. And come on in the door, join the team. Let's find the best fit where we have the most need and then their last year together.

**Ed Gaudet:** I like that like a junior assessor, even a risk assessor or a risk analyst junior that can come in and really help the process move along, but gets a real interesting.

**James Case:** I have an opening right now and in that space.

**Ed Gaudet:** You what?

**James Case:** I have an opening right now in that space. Risk advisor risk, you know.

**Ed Gaudet:** Yeah. What level? Just out of school or.

**James Case:** Medium, not senior level.



**Ed Gaudet:** Couple years. Couple years in the, yeah, I think it's a great, I think it's a great place to start because you get this unbelievable broad visibility into what's happening at the, not just in the technology space, but also within the business, and you get the ability to meet the business because you have to interact with the business.

**James Case:** On the front end as they're bringing in new applications or new systems that they're thinking about, and you're doing risk assessments. Exactly. Really seeing all sides of the equation. Yeah, yeah.

**Ed Gaudet:** Yeah, it's a really good place to start. And then, from there, I want to go into the SoC, or maybe I want to go and be an architect.

**James Case:** Or less technical.

**Ed Gaudet:** Yeah, exactly. Yeah. Yeah. That's good. Anything else to add, James, before we let you go back to it now?

**James Case:** Other than it was almost three years ago, I coined the phrase and I've been waiting to say this, and it's not written down. It's just in my mind. But you're not going to want to hear this. I did a podcast almost three years ago on someone else's podcast, and it hit me at the end of the podcast, and it ties into everything I've said throughout, the theme of everything I've said is risk, and I said it's all about the risk. It's really what I arrived at. But I would say it was the journey of that podcast where that light bulb really solidified if that makes sense. And so I guess what I'm waiting to say is, it's all about the risk.

**Ed Gaudet:** It's all about the risk.

**James Case:** In fact, when I posted that on LinkedIn, I. That's all I said, it's all about the risk. Boom. And then I put the link out there to the podcast.



**Ed Gaudet:** I love it, I love it. That's a good place to end. We'll end on that. James Case, thank you for your time today. This is Ed Gaudet from the Risk Never Sleeps Podcast. And if you're on the front lines delivering patient care or protecting patient safety, remember to stay vigilant because Risk Never Sleeps.





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